



# Capital Planning Project Ranking Criteria

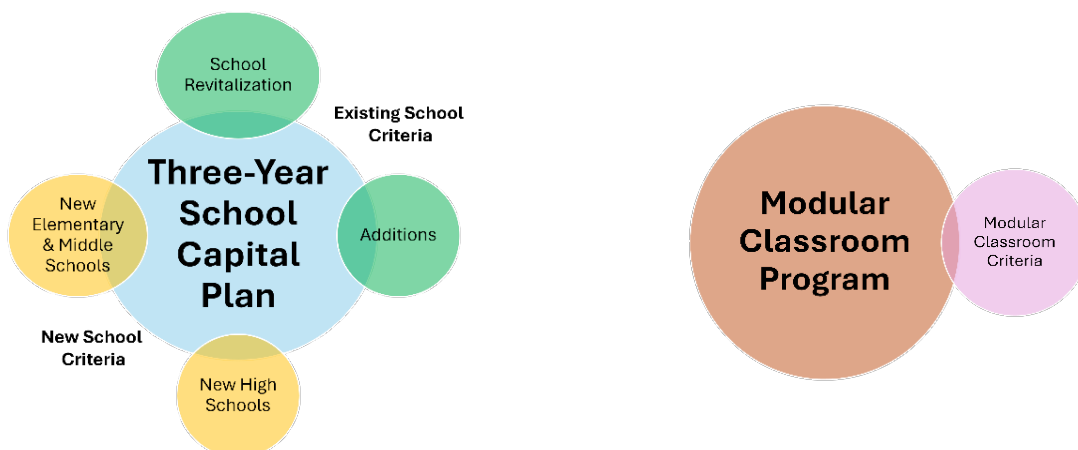
The CBE strives for evidence based, transparent and fair prioritization in the capital planning process. This document outlines the criteria by which capital priorities are considered and ranked for funding requests through the Three-Year School Capital Plan and Modular Classroom Program. The following factors drive capital planning projects.

- Program Delivery – Projects that are required to enable the delivery of school programs.
- Community Schools – New schools required in rapidly growing communities to minimize student travel times and meet the needs for a local school in their community.
- Aging Facilities – Older schools that require revitalization to provide appropriate learning environments for students.
- School Utilization Rates – appropriate school utilization rates optimize maintenance and operational funding; help manage classroom space for optimal learning and ensure availability of programming opportunities to students within the limited public resources entrusted to the CBE.

A balanced approach to address these drivers is developed to ensure the CBE is pursuing capital funding opportunities that recognize the changing needs of students, build trust with parents, partners, and the community, and direct investment to projects that provide the best value for the system. The planning approach is a system of core community based elementary feeder schools, with middle/junior high, and senior high schools serving larger geographic areas. In addition, modular classrooms can make an important contribution to bettering the student learning experience by relieving accommodation pressures during periods of growth allowing the CBE to respond appropriately across a community's life cycle.

Projects are also required to ensure programming requirements are met through existing school revitalization, which may include modernization projects, replacement schools or solution projects (a project type that allows construction activity at multiple schools).

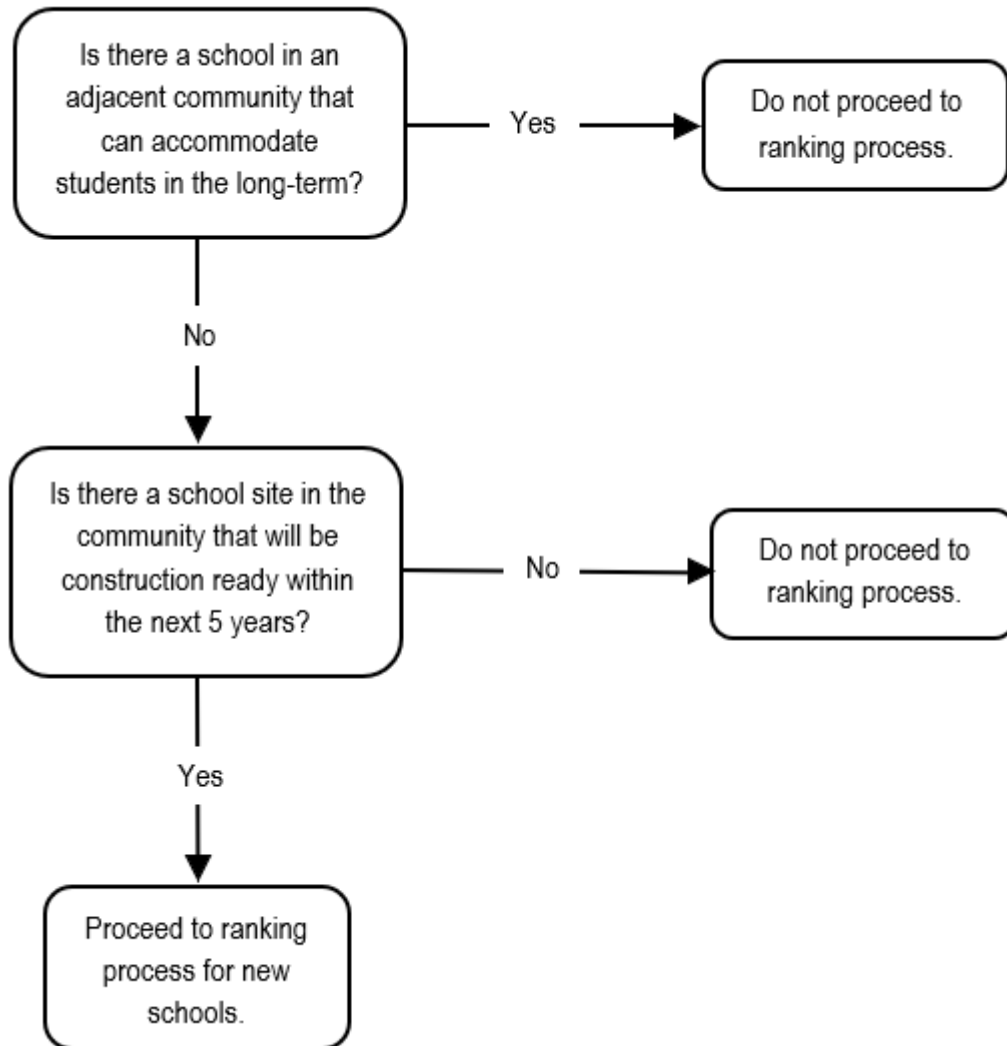
The following criteria aim to address the drivers for capital planning and provide a balanced investment approach to school capital planning and are organized as depicted below:



## New School Criteria

The New School Ranking Criteria are in place to allow for a transparent, objective and equitable approach to prioritizing where new schools will be identified and requested in the Three-Year School Capital Plan. There are two types of criteria in the evaluation process to rank schools for capital funding. Firstly, all K-12 schools go through eligibility filters to identify schools that will proceed to the ranking process. Schools that pass through the eligibility filters will be ranked through K-4 ranking criteria, 5-9 ranking criteria and 10-12 ranking criteria.

### K-12 Eligibility Filter



## Ranking Criteria (K-4)

### Preschool Population:

Use actual value of total preschool population (Age 1-5)

### Current K-4 Enrolment:

Use actual end of September enrolment

### Ratio of K-4 Enrolment to #of Housing Units in Community (%) (End of September each year)

	≤4%	5 to 9%	10 to 14%	15 to 19%	20 to 24%	≥25%
<b>Projected 5 Year Sector Population Growth (%) *</b>						
Less than 5%	10 points	20 points	30 points	40 points	50 points	60 points
5 to 14%	20 points	30 points	40 points	50 points	60 points	70 points
15 to 24%	30 points	40 points	50 points	60 points	70 points	80 points
Greater than 25%	40 points	50 points	60 points	70 points	80 points	90 points

\*Based on City of Calgary Suburban Residential Growth (prepared annually)

### Distance Travelled (km's) \*

	≤9	10 to 14	15 to 19	20 to 24	≥25
<b>Median Travel Time</b>					
15-19 minutes	10 points	20 points	30 points	40 points	50 points
20-24 minutes	20 points	30 points	40 points	50 points	60 points
25-29 minutes	30 points	40 points	50 points	60 points	70 points
30-34 minutes	40 points	50 points	60 points	70 points	80 points
35-39 minutes	50 points	60 points	70 points	80 points	90 points
≥40 minutes	60 points	70 points	80 points	90 points	100 points

\*Distance travelled calculated using GIS to determine "centre" of the community to bus receiver school.

### Other Considerations

More than one bus receiver school required for established grade configuration within two years (examples include but are not limited to K-4 and 5-9 or K-6 and 7-9). 50 points

Existing 5-9 School approved or in existence. 50 points

### Notes:

1. If a community already has a school or a starter school, the capacity of the school will be subtracted from the number of students enrolled in the CBE.
2. When there is a starter school in a community, an exception to the standard ranking methodology may be made. The community with the starter school will be assessed through the points ranking criteria but may be placed at a higher priority than the total points determine to ensure the starter school becomes a fully developed school.
3. If it has been determined through the Joint Use Site Calculation Methodology that there is only one school site available or required in a community then this site is typically requested as a K-9 school.
4. The K-4 cohort will be used for ranking purposes and the actual grade configuration requested in the Three-Year School Capital Plan may vary (e.g. K-5, K-6) depending on a variety of factors including community need, population projections for the specific area, recent capital approvals, knowledge of surrounding school capacities etc.
5. When a school has previously received Design approval, an exception to the standard ranking methodology will be made.

## Ranking Criteria (5-9)

### Current K-4 Enrolment:

Use actual end of September enrolment

### Current 5-9 Enrolment:

Use actual end of September enrolment

### Ratio of 5-9 Enrolment to #of Housing Units in Community (%) (End of September each year)

	≤4%	5 to 9%	10 to 14%	15 to 19%	20 to 24%	≥25%
<b>Projected 5 Year Sector Population Growth (%) *</b>						
Less than 5%	10 points	20 points	30 points	40 points	50 points	60 points
5 to 14%	20 points	30 points	40 points	50 points	60 points	70 points
15 to 24%	30 points	40 points	50 points	60 points	70 points	80 points
Greater than 25%	40 points	50 points	60 points	70 points	80 points	90 points

\*Based on City of Calgary Suburban Residential Growth (prepared annually)

### Distance Travelled (km's)\*

	≤9	10 to 14	15 to 19	20 to 24	≥25
<b>Median Travel Time</b>					
15-19 minutes	10 points	20 points	30 points	40 points	50 points
20-24 minutes	20 points	30 points	40 points	50 points	60 points
25-29 minutes	30 points	40 points	50 points	60 points	70 points
30-34 minutes	40 points	50 points	60 points	70 points	80 points
35-39 minutes	50 points	60 points	70 points	80 points	90 points
≥40 minutes	60 points	70 points	80 points	90 points	100 points

\*Distance travelled calculated using GIS to determine "centre" of the community to bus receiver school.

### Other Considerations

More than one bus receiver school required for established grade configuration within two years (examples include but are not limited to K-4 and 5-9 or K-6 and 7-9). 50 points

Existing K-4 School approved or in existence. 50 points

Greater than 2 Transition Points (K-9). 50 points

### Notes:

1. If a community already has a school or a starter school, the capacity of the school will be subtracted from the number of students enrolled in the CBE.
2. When there is a starter school in a community, an exception to the standard ranking methodology may be made. The community with the starter school will be assessed through the points ranking criteria but may be placed at a higher priority than the total points determine to ensure the starter school becomes a fully developed school.
3. If it has been determined through the Joint Use Site Calculation Methodology that there is only one school site available or required in a community then this site is typically requested as a K-9 school.
4. The 5-9 cohort will be used for ranking purposes and the actual grade configuration that is requested in the Three-Year School Capital Plan may vary (e.g. 6-9, 7-9) depending on a variety of factors including community need, population projections for the specific area, recent capital approvals, knowledge of surrounding school capacities etc.
5. When a school has previously received Design approval, an exception to the standard ranking methodology will be made.

## Ranking Criteria (10-12)

### Current 4-6 Enrolment:

Use actual end of September enrolment

### Current 10-12 Enrolment:

Use actual end of September enrolment

#### Ratio of 10-12 Enrolment to #of Housing Units in Community (%) (End of September each year)

	≤4%	5 to 9%	10 to 14%	15 to 19%	20 to 24%	≥25%
<b>Projected 5 Year Sector Population Growth (%) *</b>						
Less than 5%	10 points	20 points	30 points	40 points	50 points	60 points
5 to 14%	20 points	30 points	40 points	50 points	60 points	70 points
15 to 24%	30 points	40 points	50 points	60 points	70 points	80 points
Greater than 25%	40 points	50 points	60 points	70 points	80 points	90 points

\*Based on City of Calgary Suburban Residential Growth (prepared annually)

#### Distance Travelled (km's)\*

	≤9	10 to 14	15 to 19	20 to 24	≥25
<b>Median Travel Time</b>					
15-19 minutes	10 points	20 points	30 points	40 points	50 points
20-24 minutes	20 points	30 points	40 points	50 points	60 points
25-29 minutes	30 points	40 points	50 points	60 points	70 points
30-34 minutes	40 points	50 points	60 points	70 points	80 points
35-39 minutes	50 points	60 points	70 points	80 points	90 points
≥40 minutes	60 points	70 points	80 points	90 points	100 points

\*Distance travelled calculated using GIS to determine “centre” of the community to bus receiver school.

### Notes:

1. When a school has previously received Design approval, an exception to the standard ranking methodology will be made.

### 10-12 Contextual Analysis

Contextual Analysis would include the following:

- Demographic description of future catchment area and population at full build-out; availability of space in proximity to students and impact of the new school on existing schools in the area.
- Utilization Rate by Student Enrolment for impacted schools. A qualifier “Utilization Category” will be added to summarize the impact as follows:

Utilization Category	Utilization Rate
Over-utilized	School utilization rate is projected to be above 110%.
Maximized	School utilization rate is projected to be in the 101-110% utilization range.
Optimized	School utilization rate is projected to be in the 85%-100% range.
Sub-optimized	School utilization rate is projected to be in the 70%-84% range.
Underutilized	School utilization rate is projected to be below 70%.

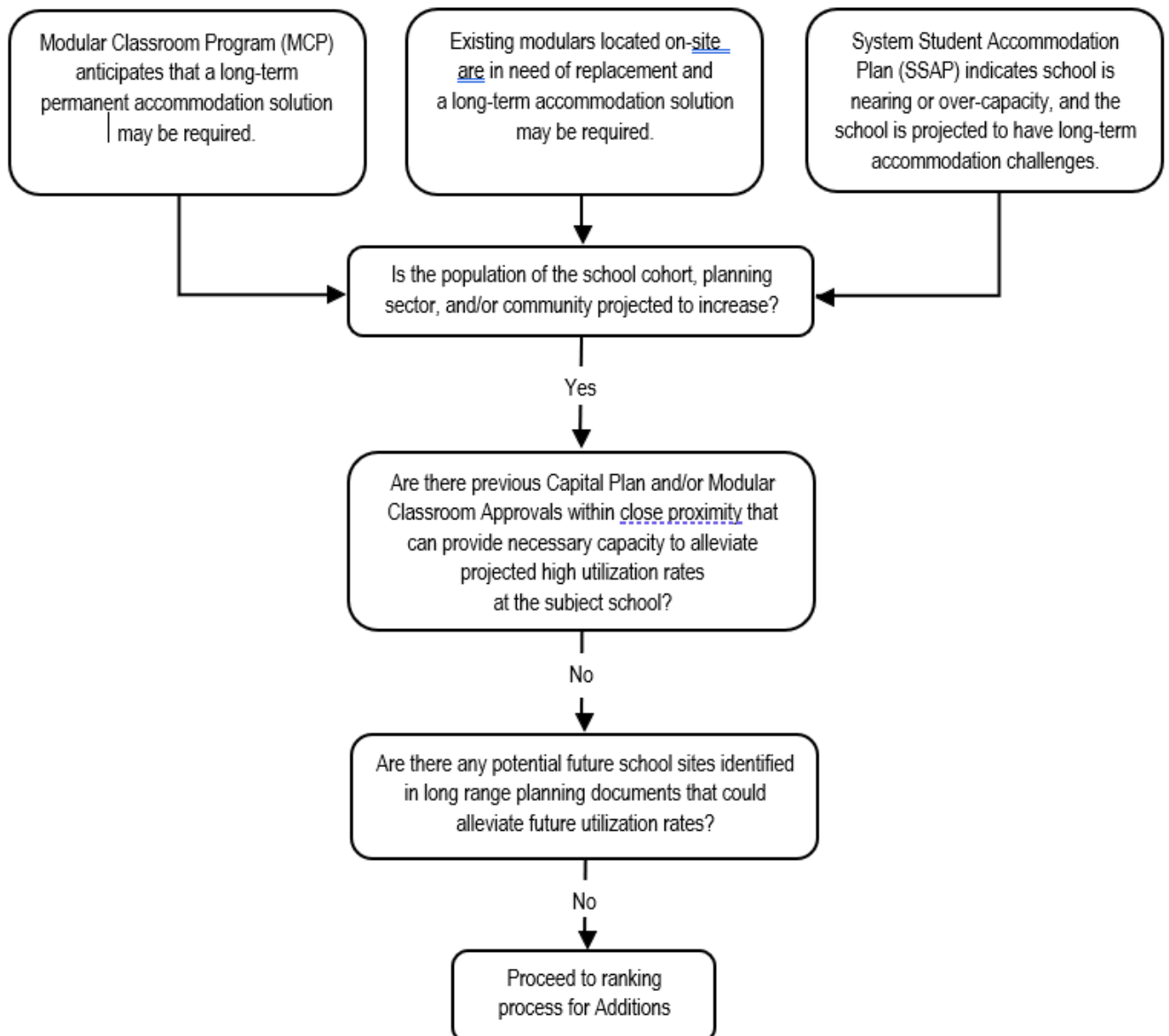
- **Utilization Rate by Student Residence:** represents the utilization rate that would exist if all existing high school students were accommodated in facilities that exist within the planning sector in which they live. This value provides insight into whether there are sufficient spaces within a given sector for the number of students living in that sector.

## Existing School Criteria

The Existing School Ranking Criteria are in place to allow for the identification and prioritization of schools that require major capital investment to ensure the school facility can effectively support the educational programming required by the community it serves. Capital investment into existing schools can take many different forms (project types) including Modernization, Replacement, Solution (construction activity at multiple schools) or expansion through a permanent school addition. The first three project types are primarily driven by the overall condition of the facility, while the need for a school addition is determined by school utilization as well as community demographics and growth projections. To account for this, the Existing School Ranking Criteria is comprised of two separate sub-criteria: School Addition Criteria and School Revitalization Criteria.

## School Addition Criteria

### Eligibility Filters



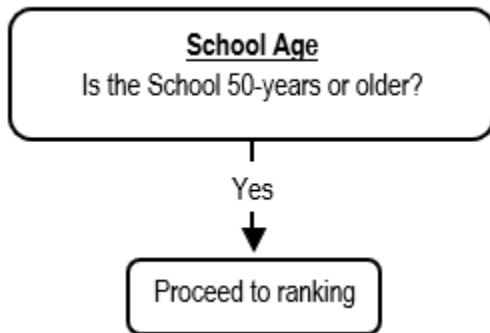
**Ranking Criteria**

**Category A: Enrolment, Utilization, Projection**

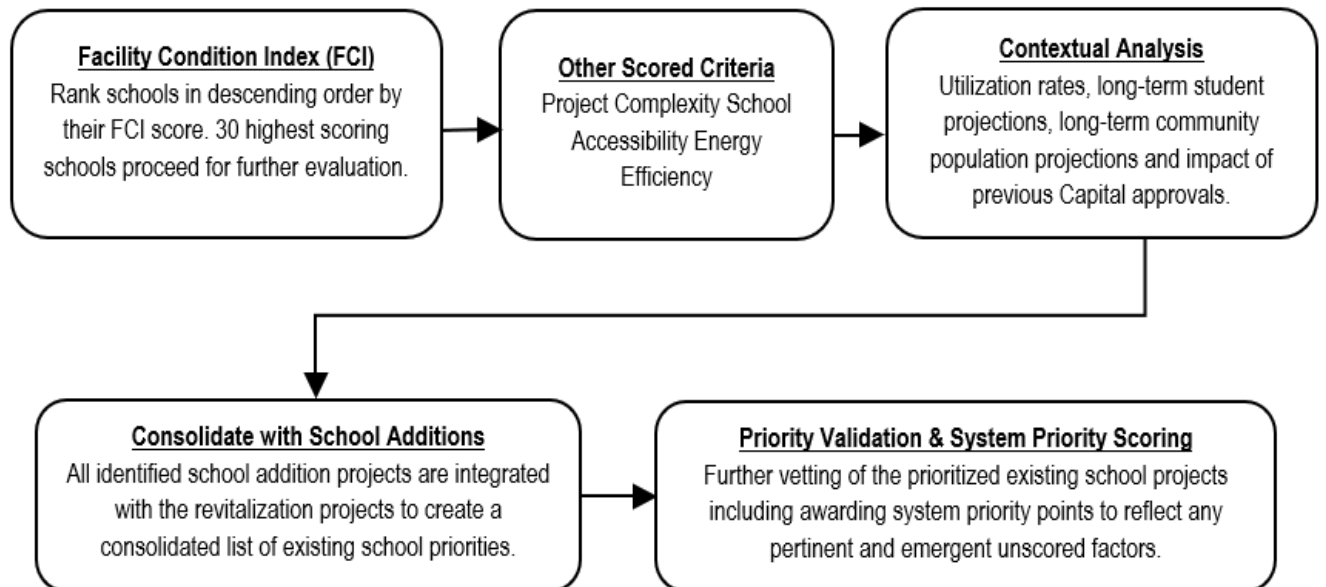
<b>Strength of enrolment and utilization into the future (Projected 3-Year Utilization)</b>	<b>Points</b>
Projected utilization is less than 89%	0
Projected utilization is between 90% to 99%	5
Projected utilization is between 100% to 104%	10
Projected utilization is between 105% to 109%	15
Projected utilization is between 110% to 114%	20
Projected Utilization is between 115% to 119%	25
Projected Utilization is between 120% to 124%	30
Projected Utilization is between 125% to 129%	35
Projected Utilization is between 130% to 134%	40
Projected Utilization is between 135% to 139%	45
Projected Utilization is greater than 140%	50

**School Revitalization Criteria**

**Eligibility Filter**



**Ranking Criteria**



### Facility Condition Index Scoring

Facility condition will be objectively evaluated based on industry standard methodology. Facility Condition Index (FCI) is the projected five-year cost of needed repairs, replacements and renewal expressed as a percentage of the current cost of replacing the facility. The FCI is calculated using the following formula:

$$\frac{\text{Outstanding Repairs, Replacement \& Renewal}}{\text{Replacement Cost of Facility}} \times 100$$

As a general guide FCI scores fall in the following broad rating categories:



#### Notes:

1. For scoring purposes, one percentile equals one point i.e. 30% FCI will receive 30 points.
2. Until such time as the CBE develops a more rigorous data set to properly calculate FCI, a simplified methodology and accompanying tool has been developed that will be used to calculate an estimated FCI score.

### Other Scored Criteria

#### Project Complexity Scoring Criteria

Provincial Capacity	Points
Provincial Capacity > 2,000	20
Provincial Capacity between 1,500 to 1,999	15
Provincial Capacity between 1,000 to 1,499	10
Provincial Capacity between 600 to 999	5
Provincial Capacity between < 600	0
Learning Environment Factors	Points
5+ CTS/CTF Shops	10
3-4 CTS/CTF Shops	5
1-2 CTS/CTF Shops	3
Specialised Infrastructure to support Inclusive Learning (pools, safe rooms...)	10
Historical Significance	Points
Historical significance	5
<b>Maximum available points</b>	<b>45</b>



**School Accessibility Scoring Criteria**

Degree of Accessibility	Points
Not accessible – Accessibility upgrades are not possible/feasible	20
Partially accessible 1 - Close to Not Accessible; significant modifications would be needed to accommodate a student in a wheelchair.	15
Partially accessible 2: Mid-range accessibility, some renovations/accommodations would be required.	10
Partially accessible 3: Close to Fully Accessible, just a few upgrades would be needed to accommodate a student in a wheelchair.	5
Fully accessible	0

**Energy Efficiency Scoring Criteria**

Provincial Capacity	Points
< 0.55 GJ/sq.m	0
0.56 to 1.1 GJ/sq.m	5
1.11 to 1.65 GJ/sq.m	10
>1.66 GJ/sq.m	15

**Contextual Analysis**

Additional unscored analysis and contextual understanding of each fully scored school will include answering questions on utilization rates, long-term student projections, long-term community population projections and the impact of previous Capital Plan/Modular Classroom Program (MCP) approvals. These questions include:

- Will capital investment in an existing school assist with either an underutilization or overutilization issue?
- What is the long-term utilization projection of the school?
- What is the long-term population trend of community?
- Are there multiple schools identified on the short list located in close proximity and could possibly benefit from a Solution project?
- What is the impact of either Three-Year School Capital Plan or Modular Classroom approvals on future utilization rates?

Should the contextual analysis identify additional schools outside of the list of 30, these schools can be added for further consideration and evaluation as a system priority.

**Priority Validation & System Priority Scoring**

The list of schools is then reviewed and vetted for those that present the largest learning hindrances (i.e. indoor temperature extremes, ineffective school layout, highest risk of critical building system failure etc.) or that might present the greatest opportunity to advance system educational priorities. Discretionary 'System Priority' points may be awarded where emergent system priorities exist that are not reflected in the current scoring construct. Awarding system priority points to select projects must be approved by the Superintendent's Team.

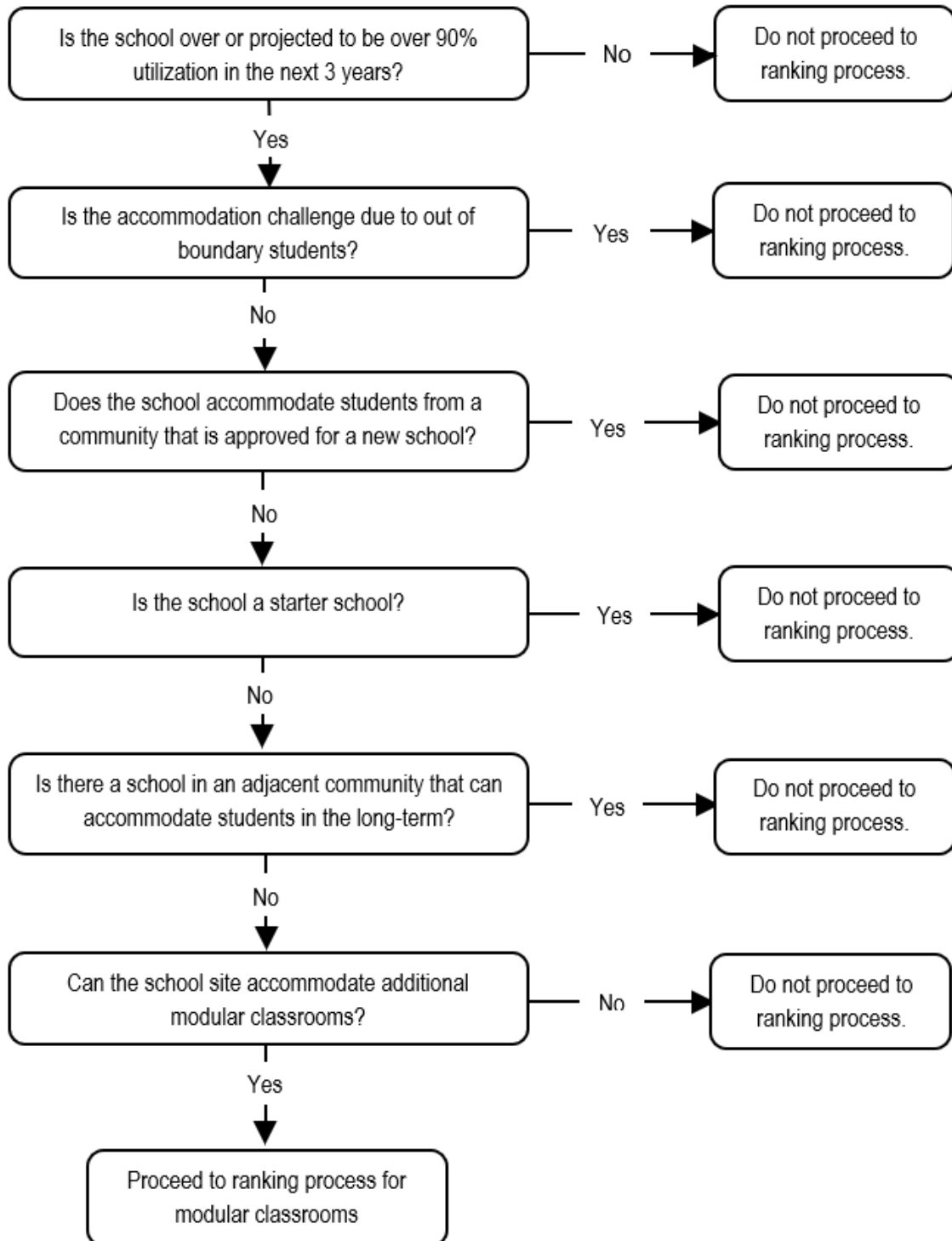
Schools with greatest need and system alignment will be evaluated against the new school priorities to determine what gets included in the Three-Year School Capital Plan. Existing school projects will generally first request Planning funding to confirm project type and scope, unless the project is already well defined and understood.

## Modular Classroom Program

Modular classroom ranking criteria is utilized to evaluate and prioritize new modular classroom requests in the Modular Classroom Program.

### Modular Classroom Criteria

#### Eligibility Filter



### Ranking Criteria

#### Category A: Enrolment, Utilization, Projection

<b>Strength of enrolment and utilization into the future (Projected 3-Year Utilization)</b>	<b>Points</b>
Projected utilization is less than 89%	0
Projected utilization is between 90% to 99%	5
Projected utilization is between 100% to 104%	10
Projected utilization is between 105% to 109%	15
Projected utilization is between 110% to 114%	20
Projected Utilization is between 115% to 119%	25
Projected Utilization is between 120% to 124%	30
Projected Utilization is between 125% to 129%	35
Projected Utilization is between 130% to 134%	40
Projected Utilization is between 135% to 139%	45
Projected Utilization is greater than 140%	50

#### Category B: Site Features, Location

<b>Ability to add modular units to the site</b>	<b>Points</b>
Site Size - ability to accommodate portables	1
Physical Obstructions (large trees, playground equip, catch basins, elec. T transformers, etc.)	1
Site Grading, contours (slope to portables not good)	1
Additional Parking Requirements	1
Additional Washroom stall / sink requirements	1
Sight lines for Security, creates concealed areas	1
Ability to locate portables near entrance	1
Ability to connect with a corridor	1
Ease of connecting services, i.e. gas, power, data	1
Proximity to underground services restricting placement (i.e.: main elec, water, sewer)	1
Proximity and quantity of windows opposite the modulares	1
Fire rating of school exterior wall	1
Existing Firewall on school to accommodate addition	1
Distance from Street (within 15m will allow for more)	1
Location on site for aesthetics.....front vs. rear vs. side	1
Existing catch basins in vicinity to portables for roof drainage	1
Proximity to main sidewalks (downspouts cause icing)	1

Ranking Range: 0 (difficult) o 1 (easy)

#### Category C: Cost to add modular units compared to average cost to add modular units to a site

<b>What is the anticipated cost of modular units at this site?</b>	<b>Points</b>
1 = Poor                \$\$\$\$ (More than 25% more)	5
2 = Fair                \$\$\$\$ (Between 20 to 24% more)	10
3 = Good                \$\$\$ (Between 15 to 19% more)	15
4 = Very Good        \$\$ (Between 10 to 14% more)	20
5 = Excellent         \$ (Less than 9% more)	25